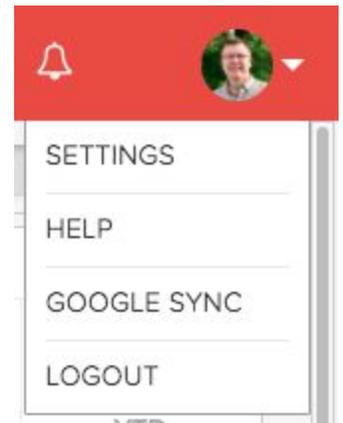


Account Settings

Account Owner / Admin

As the Account Owner / Admin of your realvolve account there are some important settings that need to be assigned. To access the Settings area of Realvolve, login to your realvolve account: <http://login.realvolve.com> and enter your login information. Click on the down arrow located in the upper right corner of the red header of the realvolve screen. (*Right of the User Avatar*). Click on **SETTINGS** from the dropdown menu to show the settings options on the left side of your screen.



1. Select the **"My Account"** option to enter your personal information.

Be sure to fill in all the fields since they are used as merge fields in messaging templates which we will cover later. The Team Name, Service Area and In Business Since fields are only available to the Account Owner / Admin so be sure to fill them in. Press the **Update** button to save your information.

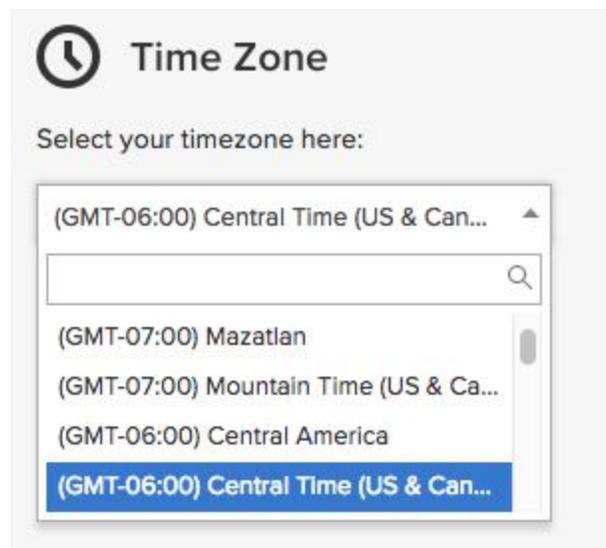
Note: Along with entering your personal information, the "My Accounts" section can be used to change your password, The Plan and Billing Info section which allows you to see your subscription plan and make changes as needed, including Credit Card Details and previous billing transactions and the ability to Cancel your subscription.

2. Select **"Email"** to connect your IMAP/SMTP email account. There are several Email settings which can be ON/OFF including the following:
 - a. **Auto Signature** - Automatically Add the default signature on outgoing emails.
 - b. **Email Notifications for Start Workflow** - Receive an email notification when workflows are started on Contacts, Properties or Transactions from the server.
 - c. **Email Notification for Incoming Email** - Receive an email notification in your personal account when receiving emails in your Realvolve account.

- d. **Auto Send Message** - This is the **MASTER SWITCH** which allows outbound emails and SMS text messages to be sent automatically/immediately from workflow actions. Your messages **WILL NOT BE SENT** automatically if this setting is **OFF**
 - e. **Daily Email Reminders** - Receive daily email notification with Appointments, Todo's as well as reminders on import dates on Properties & Transactions.
 - f. **Sending Messages** - Automatically BCC personal email account when sending emails through your Realvolve email account. This allows a copy of Realvolve emails to be stored in your personal email account.
3. Select "**Automation**" to turn ON two important automation features available to your realvolve account. Use the following link for more details:
<http://go.realvolve.com/automation>
4. Select "**SMS Services**" to choose a custom SMS number for sending text messages from inside Realvolve. Choose your country, enter your local area code then choose one of the available SMS numbers then click **Save**.

Note: In order for Realvolve to send SMS messages you MUST select from the list of available SMS numbers. ***THIS WILL NOT BE THE SAME AS YOUR NORMAL MOBILE PHONE SMS NUMBER.***

Once you have an assigned Realvolve SMS number you can select notification preferences to receive Emails and/or SMS notifications when you receive a Realvolve SMS Message. Realvolve uses the "Cell Phone" field in your My Account settings for notifications.



5. Select "**Time Zone**" to select your correct Time Zone.

Note: *If you are in the Central Time Zone in the US or Canada be sure to "Central Time (US & Canada" and NOT "Central America"*

6. Select "**Boards**" to assign the name of each MLS Board that you are a membership in. If your board name is in the Master boards then select it and press **Save**. Otherwise, manually add the custom boards by entering State Name, Acronym, Board Name and Service Area then press **Save** to be listed at the bottom of the screen. An example for The Greater Springfield Board of Realtors in Springfield Missouri you would entered as follows:

State: Missouri

Acronym: GSBOR

Board Name: Greater Springfield Board of Realtors

Area: Southwest Missouri

Boards Video: [CLICK HERE](#)

Note: Currently, Realvolve **DOES NOT** connect directly to any MLS. However, we do allow you to assign multiple Company / MLS numbers to each Property Listing using this "Boards" setting.

7. Select "**Contact Source Type**" and assign the name of each source of contacts. Tracking where contacts originated from helps to drive future advertising and marketing decisions. Sources can be picked from the master list or create your own custom source. Once you have made your selections, press **Save** to add the source names to your master pick list.
8. Select "**User & Permissions**" to assign permissions. **THIS TOPIC WILL BE DISCUSSED IN THE NEXT LESSON.**

9. Select "**Set Default Fields**" to setup the default values for Property and Transaction fields. Realvolve maintains a large list of available party member types and dates. Go through the lists and place a checkmark on each party member and date type that is used in your geographic area on a regular basis. You can leave less frequently used fields unchecked and add them as needed to the property or transaction.

([SEE VIDEO](#))

Party Member Video: [CLICK HERE](#)

Date Type Video: [CLICK HERE](#)

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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